

## A Streamlined Approach to the Management Performance Evaluation Process

### Quick Reference Guide for 2012 Final Review Stage


#### ACES 2012 – Final Review Phase (September)

Completed forms are due to your agency ACES Coordinator **by Friday, October 12, 2012.**

**This Quick Reference Guide will help ACES users to:**

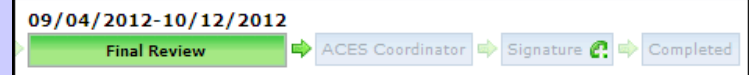
- Verify the 2012 ACES form is in Final Review phase;
- Assign ratings;
- Enter final comments for each Manager Objective, Career Growth Objective & Core Managerial Competencies; &
- Select a Final Review Overall Rating.

After you log in, **follow the steps outlined for your role e.g. Reporting Mgr., Appraising Mgr. in each of the following sections.**

**Important Tip:** Click on **Save**  button every 10 minutes as your login session will timeout after 20 minutes of inactivity. Inactivity is considered typing in the form & not clicking on the save button.

#### Important Notes about Final Review & Remaining Stages

- **Form Changes to Routing After Final Ratings are Entered.** After the final review ratings are entered, the appraising manager clicks on **"DONE! Send form to ACES Coordinator"**, and the form goes into a routing based process, while being sent to the ACES coordinator. The remaining steps are also routing based.

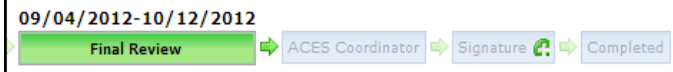


- **ACES Coordinator Phase.** ACES Coordinators hold forms in this stage until ACES rating distributions are approved by HRD and your Secretariat HR Director notifies you that the ratings may be shared.

#### Reporting Manager:



##### A. Ensure ACES Form is in Final Review Stage

1. Log into ACES. Click to **My Forms** tab.
2. Find your ACES form. Click on the link to the form.
3. The diagram at the top of the form will indicate the current stage the form is in.





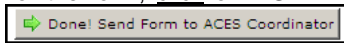
4. If the current step is Final Review, skip to Box B below to start working on your form.
5. If the form is in the Planning or Progress Review step:
  - ☐ Consult [Moving ACES Form to the Right Step Job Aid](#) or
  - ☐ Contact your agency [ACES Coordinator](#) for assistance.

##### B. Complete Final Review Activities

1. **Manager Objectives Section:**
  - ☐ Review and update milestones, if any.
  - ☐ Add optional comments in the "Final Comments" field under each objective.
2. **Career Growth Objectives:**
  - ☐ Review and update milestones, if any.
  - ☐ Add optional comments for each career growth objective.
3. **Core Managerial Competencies:** Enter optional comments.
4. **Final Review Overall Rating and Comments:** Enter optional comments.
5. **Completion of EPRS Forms.** Confirm that you have completed EPRS evaluations for your non-managers or select "not applicable" if you have no non-manager direct reports.
6. Click on **spell check** icon  at top of form to complete a spell check of the entire ACES form.
7. To **save** your edits click on the **Save**  icon.
8. Inform your appraising manager that you have finished entering final comments on your form.

#### Appraising Manager:

**Important Note:** In final review stage, the appraising manager can view the reporting manager final comments. However, the final review ratings and comments you (the appraising manager) enter will not be able to be viewed by the reporting manager until the form is in Signature Stage.

1. Log into ACES. Click to **My Forms** tab.
2. Find your reporting manager's ACES form and click link to access the form.
3. **Manager Objectives Section:**
  - ☐ Review the comments (if any) by your Reporting Manager. Add comments in the **"Final Review Comments by [your name]"** box.
  - ☐ Assign a Final Rating to each Manager Objective.
4. **Career Growth Objectives:**
  - ☐ Add comments for each objective, and assign a Final Rating to each Career Growth Objective.
5. **Core Managerial Competencies:**
  - ☐ Assign a Final Rating to each behavior under the Core Managerial Competencies, & enter optional comments.
6. **Final Review Overall Rating and Comments:**
  - ☐ Enter overall final performance comments.
  - ☐ Assign a Final Review Overall Rating.
7. **Completion of EPRS Forms.** Ensure that your reporting manager has selected whether EPRS non-manager evaluations for his/her direct reports has been completed.
8. Click on **spell check** icon  at top of form to complete a spell check of the entire ACES form.
9. Click on the **Save**  icon to **save** your edits.
10. At the top or bottom of the form, click on **DONE! Send to ACES Coordinator.** 
11. A new window opens. In text box, enter any comments to be included in email to be sent to the ACES Coordinator. Click on **DONE! Send to ACES Coordinator** button. Comments entered in this text box are neither required nor are incorporated into the reporting manager's ACES form. Form is then sent to your ACES Coordinator, who holds forms in his/her inbox until your agencies/Secretariats ratings are approved.



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## **Frequently Asked Questions (FAQs)**

**1. My account is locked.** If you've tried logging on too many times with the wrong password, you will get a message on the login screen indicating that your account has been locked and to contact your local administrator. Your Agency [ACES Coordinator](#) can unlock your account or you can send an email to HRD's [ACESHelp](#) email.

**2. I forgot my password.** Click the "Forgot Your Password?" link from the [ACES login screen](#) to have your password sent to you by email. You will be redirected to a page where you can enter your Employee ID in the Username box, then click Email Me. Notify your Agency [ACES Coordinator](#) if you do not receive the e-mail message.

**3. Why am I'm not receiving any email notifications about ACES?**

There may be a few reasons you are not receiving ACES emails:

- Has your name changed? Has your agency recently changed to massmail email addresses? When you transferred from one Executive Branch agency to another did your email address change? You may not have a valid e-mail address in ACES. Check your name under the "Directory" tab located in the upper right corner of the screen to see if your email address is valid. Report any changes to your Agency [ACES Coordinator](#) who will update this information in HR/CMS (payroll system) and ACES. Information needs to be accurate in both systems.
- A SPAM filter may be preventing your entire department from receiving these messages. Human Resources Division (HRD) has worked with the Information Technology Division to add SuccessFactors to their list of acceptable senders. If you are not receiving messages and your email address is correct in ACES, please contact your agency [ACES Coordinator](#). The ACES coordinator can then contact your IT department to check whether a SPAM filter is blocking ACES email notifications.

**4. What if a direct report(s) form is not in my inbox?** You should notify your Agency [ACES Coordinator](#) who can update supervisory relationships in the payroll system. For ACES Coordinators without administrative access, they can request that HRD update supervisor in ACES, via the [ACESHelp](#) email.

**5. What if after sending a direct report form to the ACES Coordinator I need to re-access the form again or realize I need to make additional edits?** All ACES forms you send to the ACES Coordinator can be viewed in your "En Route" folder under **My Forms**. If you need to make additional changes to the form, contact your [ACES Coordinator](#) who can move the form back to you in final review phase (or HRD can complete this for ACES coordinators without this access).

**6. I started as a manager after April 1, 2012. Do I still need Progress Review Ratings assigned?**

Anyone hired between April 1, 2012 and June 30, 2012 should have an ACES Form. These managers should work on entering objectives in the Planning Stage and then have their supervisor review them. Once the objectives have been finalized and the appraising manager has reviewed them, the form can bypass Progress Review stage and be routed to Final Review. [ACES Coordinator's](#) with administrative access can complete this or for those without administrative access, they can request that HRD to complete this via HRD's [ACESHelp](#) email. Those hired between July 1, 2012 and September 30, 2012 will not have an ACES 2012 form. They will receive a 2013 form, in the Fall when all other managers receive their forms.

**7. I recently transferred from one agency to another Executive branch agency in a new management role. How can my new appraising manager rate me on objectives that I worked on at my former agency?** If you transferred late in the review cycle, in August or September, it may be possible for your former appraising manager to complete your 2012 evaluation since for the majority of the review period you were working on objectives in your former agency. Contact your [ACES Coordinator](#) who can contact your former agency's [ACES Coordinator](#) to see if this would be possible.

**8. When can I meet with the Reporting Manager to discuss Final Review Overall Ratings?**

Final ratings should **NOT** be shared with your reporting manager(s) until HRD has approved your agency's rating distributions and your HR Director has notified you. The earliest this would occur is mid-October.

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If you need more help on the Final Review process you may want to read the detailed [Final Review Job Aid](#), or refer to other materials on HRD's [2012 ACES Final Review](#) web page.